TOURISM MARKETING

Strategic Plan 2004-07

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Yukon
Canada's True North

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Yukon Tourism Marketing: Strategic Plan 2004 – 2007

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TOURISM MARKETING: Introduction

With a change in customer travel shopping behaviour, resulting from numerous influences and evolving trends, we must continually challenge our marketing strategies. We must adapt our communications to meet new customer demands, remain vigilant in terms of how we position the Yukon brand, and remain flexible enough to adapt to global events such as SARS, West Nile virus and weak economies.

Tourism marketing faced "The Perfect Storm" in 2003. Not only were we managing the external challenges of the war in Iraq, SARS and mad cow disease, but internally we engaged in a stakeholder-driven restructuring of the Yukon Tourism Marketing Partnership (YTMP) and the development of the Senior Marketing Committee (SMC). The SMC was appointed by the Tourism Industry Association of the Yukon (TIAY) and is comprised of up to 15 industry representatives who bring diverse marketing experience to the table. Yukon tourism marketing must be industry-led, market-driven, and research-based. The SMC plays an integral and valuable role in Yukon tourism marketing by participating in the development and evaluation of Tourism Yukon's marketing programs.

The Department of Tourism and Culture has identified a number of priorities for Fiscal Year 2004/2005 including but not limited to:

- Development and Implementation of a Yukon Branding Program
- Enhance International and Domestic Air Access to the Yukon
- Decade of Sport and Culture
- Product Development
- Yukon Scenic Drives

The 2004/2005 Tourism Marketing Strategic Plan will deliver an integrated and coordinated marketing program that makes the most effective use of budget resources.

- Customer Relationship Marketing
- Promotion of Niche Markets
- Partnerships
- National Tourism Strategy
- Research - 2004 Visitor Exit Survey
- Tourism Cooperative Marketing Fund

TOURISM MARKETING: Roles and Responsibilities

Department of Tourism and Culture

In partnership with the private sector, governments, and other stakeholders:

- Generate long-term economic growth and revenues for the benefit of Yukon people through the development and marketing of the Yukon tourism industry
- Generate long-term economic growth and maximize social-cultural benefits for Yukon residents and visitors through the preservation, development and interpretation of historic resources, visual, literary and performing arts and cultural industries in the Yukon

Marketing Branch

The Marketing Branch is responsible for the marketing and promotion of the Yukon as a year-round visitor destination.

The Marketing Branch consists of five operational units:

- Special Projects and Regional Initiatives
- Information Services
- Mass Communications and Partnerships
- Travel Trade
- Tourism Product Development and Research

Branch Objectives

To work in partnership with private and public sector organizations and industries to:

- Enhance Yukon as a stand-alone visitor destination through diversified image development and product development
- Continue to grow shoulder season and winter tourism
- Stimulate tourism product development
- Utilize new technologies to enhance inquiry and conversion rates, design and conduct research, deliver timely information more efficiently and measure success
- Grow the convention, meetings and incentive travel sector
- Continue to develop sport tourism
- Develop and implement strategic tourism marketing programs designed to maximize visitor length of stay and per capita expenditure
- Work with the travel trade to stimulate new package tour development and promotion

TOURISM MARKETING: Roles and Responsibilities

Tourism Industry Association of the Yukon (TIAY)

TIAY's mandate is to ensure that tourism remains a strong, vibrant and sustainable industry across the Yukon. TIAY facilitates tourism awareness campaigns in the Yukon and, working in cooperation with Tourism Yukon, delivers essential tourism information to industry from government, the Canadian Tourism Commission (CTC), Tourism Industry Association of Canada (TIAC), and other industry associations. TIAY advocates the importance of tourism as a significant contributor to the Yukon's economy.

TIAY provides secretariat services to the Yukon Tourism Marketing Partnership Senior Marketing Committee.

YTMP Senior Marketing Committee (SMC)

A committee of up to 15 Industry representatives appointed by the Tourism Industry Association of the Yukon is mandated to:

- Lead tourism marketing strategy development
- Evaluate the effectiveness of Tourism Yukon marketing programs
- Advise the Department of Tourism and Culture and TIAY on marketing and other tourism issues

Tourism Yukon's marketing will be industry-led, market-driven and research-based.

Industry-led

The YTMP Senior Marketing Committee will approve the Yukon Tourism Marketing Strategic Plan and Yukon Tourism Marketing Implementation Plan. The SMC and other industry members will provide a conduit to review and evaluate Tourism Yukon's marketing programs.

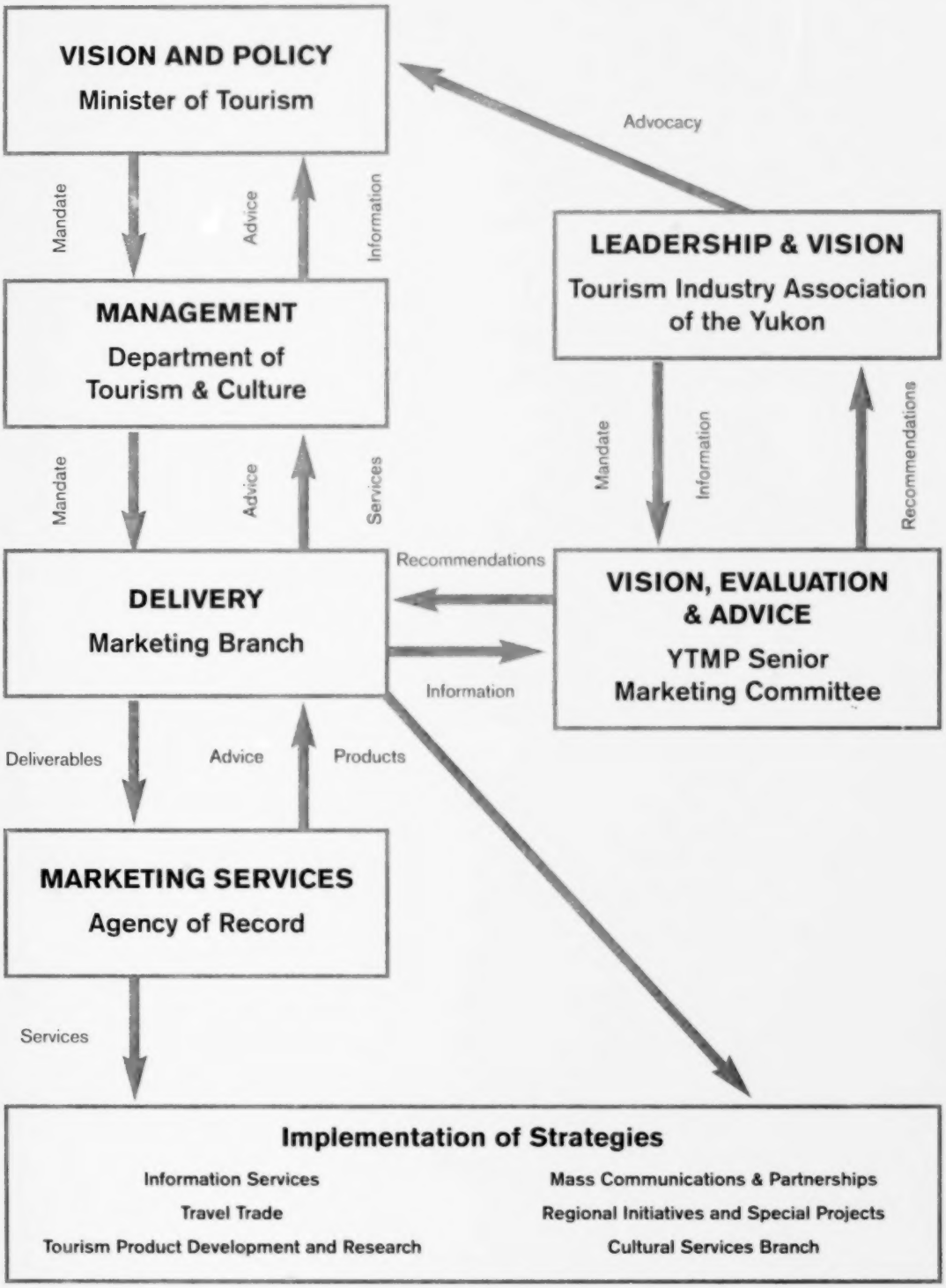
Market-driven

Tourism Yukon's marketing is organized according to geographic markets, which enables us to develop different strategic priorities for each market. Tourism Yukon collects strategic intelligence from various government and industry services to support the industry decision-making process. Tourism Yukon works with the CTC and other trade partners to ensure that its programs are relevant and meet market expectations.

Research-based

Tourism Yukon will conduct relevant and timely research while planning, executing and delivering marketing programs to ensure that they are cost-effective and that they deliver a reasonable return on investment (ROI).

TOURISM MARKETING: Organizational Relationships



TOURISM MARKETING: Vision, Positioning, Strategy and Goals

Vision Statement

Be the unique, legendary Yukon through
real experiences, real people, real history and real nature.

YTMP – January 2001

Marketing Positioning Statement

Yukon is a real wilderness destination featuring people whose northern lifestyle celebrates our nature, history, arts and cultures. Yukon's tourism industry delivers high-quality, hands-on, authentic and year-round cultural, historical and natural experiences in all regions.

YTMP – January 2001

Tourism Marketing Overall Strategies

- Grow tourism revenues through product development, industry development of approval standards and marketing programs, debt, etc.
- Enhance Yukon brand awareness and equity
- Convert awareness to qualified inquiries
- Convert inquiries to visitation
- Encourage visitors to stay longer and spend more
- Enhance the return on investment for all marketing programs
- Leverage marketing resources with the CTC and other partners
- Clearly communicate strategies, plans, and marketing initiatives to Yukon industry stakeholders

TOURISM MARKETING: Vision, Positioning, Strategy and Goals

Shared Goals of Industry and Government

The overall goal for this three-year plan is to increase total tourism revenue. Based on World Tourism Organization (WTO) projections (September 2003), we are estimating that tourism revenues in the Yukon will grow by two per cent per year over the next three years.

The WTO estimates that inbound tourism in North America will grow by 2.9 per cent per year. WTO reports that Canada experienced 1.9 per cent growth in 2002.

Long-Term Goals

- Position Yukon as the premier wilderness destination in North America
- Achieve awareness in key markets as an unspoiled wilderness destination
- Create internal stakeholder ownership of tourism development and marketing – Importance of tourism role in long-term economic vision
- Elevate Yukon as a destination of choice that meets and exceeds the lifestyle expectations of a global audience
- Earn high customer satisfaction and loyalty

Medium-Term Goals – 2005 – 2007

- Execute an integrated Brand Yukon campaign across all sectors
- Engage brand asset management protocol – imagery, icons
- Increase ROI from industry assets
- Raise awareness amongst Yukoners that tourism is a key economic sector, that is critical to developing a long-term sustainable economy in the Yukon
- Earn high customer satisfaction and loyalty

Short-Term Goals – 2004

- Develop and implement Tourism Marketing Strategic Plan
- Develop and implement a Brand Yukon Strategy
- Re-evaluate effectiveness of current objectives/strategies/tactics/collateral
- Develop and implement a new research strategy

TOURISM MARKETING: Market Planning

Key Principles

- Tourism marketing is industry-led, market-driven and research-based
- Maintain respect for the environment, respect for Yukon people, and nurture sustainable communities
- Tourism Yukon will build and protect a strong Yukon brand
- The focus of Tourism Yukon's marketing programs will be building destination awareness, generating qualified leads, converting leads to Yukon visitation and increasing spending when visitors are in destination
- Tourism product development is critical to tourism success and will require an economic and regulatory environment that supports development opportunities
- Consumer awareness and positioning of the Yukon as a "must see" destination is critical
- Tertiary market (i.e. France, Netherlands, Mexico, etc.) activities will be led by industry, trade partners and the CTC
- New marketing initiatives and integrated marketing programs (e.g. Internet, database and customer relationship marketing) will be supported by appropriate investments
- Practical, simple approaches will be utilized to measure results
- The Tourism Marketing Strategic Plan is a dynamic document that will be updated annually

Planning Assumptions

- Tourism Yukon and industry investments will remain constant similar to 2003 levels
- Marketing plans must be flexible to react to changing market conditions
- The Canadian dollar will remain relatively constant at late 2003 levels
- The Canadian economy is expected to see slower growth (2.8 per cent in 2004)
- The U.S. economy will experience recovery through 2006 and will grow by 4.5 per cent in 2004
- Economic growth in Europe, Asia-Pacific and the UK will grow at a rate of 2–3 per cent
- Air access will remain at current levels with existing carriers and pricing
- The plan does not consider a disruption in global travel as a result of military action or terrorism

Key Tactics

- A mix of direct consumer activities and distribution channel (trade) marketing will be used
- Build awareness of the Yukon brand
- Tourism products marketed will be defined and sold solely by industry
- Joint investments with traditional and non-traditional marketing partners will enhance destination awareness, positioning and sales
- Focus will be on the best-producing primary markets

TOURISM MARKETING: Market Planning

Strategic Considerations

Several issues have been identified by the YTMP Senior Marketing Committee for discussion and action in fiscal year 2004/2005:

- Review allocation priorities for marketing funds
- Review current print collateral investments in the interest of improved efficiency, relevance and cost
- Define how Yukon's tourism product is unique in the world and establish guidelines on how it should be positioned
- Build a brand that represents the diversity, authenticity and magic of the Yukon and speaks to all potential visitors
- Explore potential new mechanisms to financially support tourism promotion on a sustainable basis (Many competing jurisdictions fund tourism marketing through bed/room taxes)
- Lobby federal government for an Economic Development Agreement to support tourism marketing and product development in the north
- Investigate the potential to enhance and expand cooperative marketing with Alberta, British Columbia and Alaska
- Enhance the development of tourism products for all markets
- Encourage the development of First Nations tourism product
- Explore opportunities to work more effectively with the Canadian Tourism Commission's programs
- Issues affecting tourism are monitored by the CTC, TIAC, WTO and other external organizations – this research will be utilized by Tourism Yukon and the YTMP Senior Marketing Committee in developing tourism marketing strategies and plans

Decision-Making Process of the Yukon Visitor

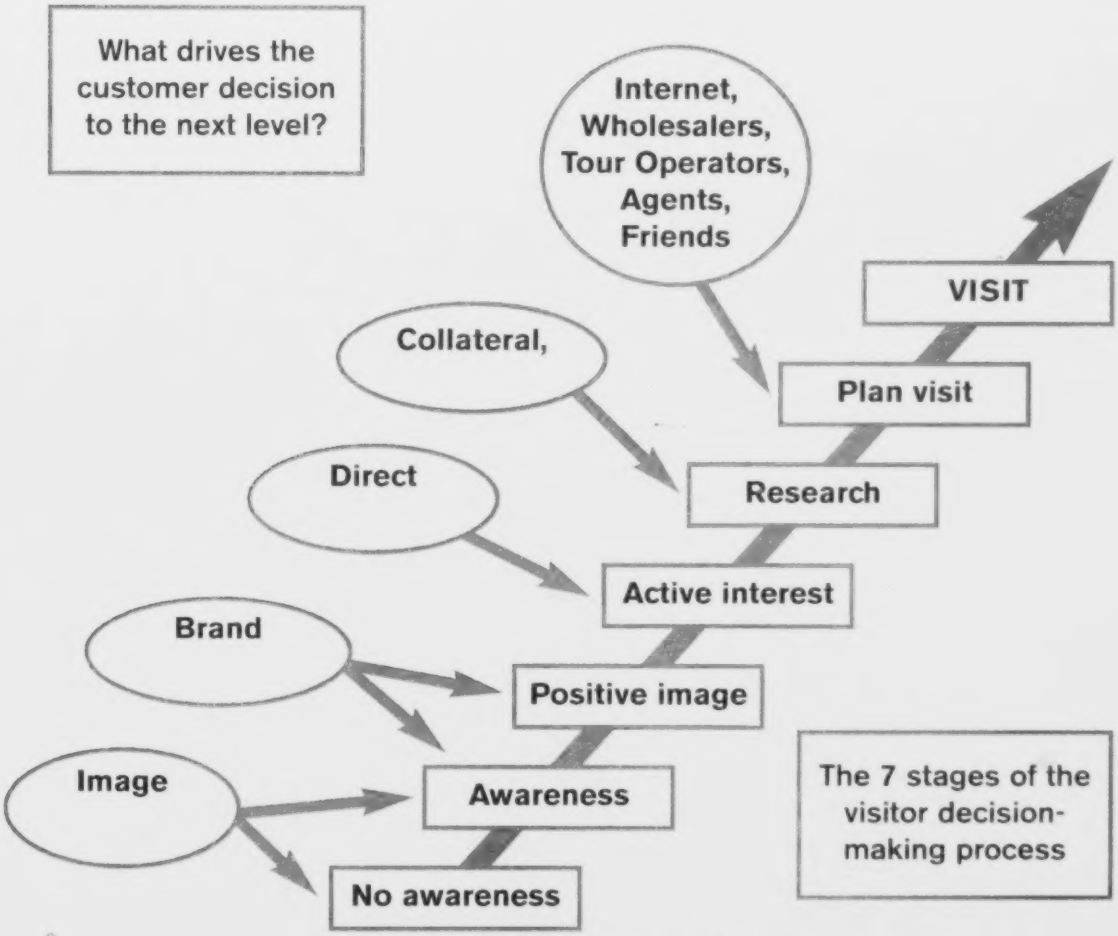
A trip to the Yukon holds different significance for each potential visitor. Some are taking the trip of a lifetime. For others it could be a desire to travel north. Regardless of the reason, the starting point in the decision-making process begins with an awareness of the Yukon and the desire to visit.

Once the desire to visit has taken hold, the visitor will need to research the options and logistics to plan their trip. Tour details and general information must be readily available in order to support the planning process. Yukon suppliers must get their product information out to these potential visitors through Web sites, working with the trade, partnering with other operators, and providing online support to inquiries.

A variety of information should be put forth for potential visitors to consider, not just Yukon icons such as wilderness hiking, river travel and historical sites. There needs to be a wide selection of tour options to choose from to address the vacation expectations of diverse audiences that all support the Brand Yukon experience.

For potential visitors who do not already have an awareness of Yukon, campaigns that incorporate strong visual images tend to be the most effective.

Once they have researched the destination and have the majority of their questions answered, a decision to visit the Yukon is made. The next step is to plan their trip, which may be with the support of a travel agent or independently through collateral material and the Web site.



TOURISM MARKETING: Market Planning

Target Audience

The target audience for Tourism Yukon's marketing programs consists of a primary market of reasonably affluent couples, with no children, age 35+. The secondary target market is employed couples with children, age 35+, and travellers 35 and under with no children.

Over the years, these targets have proven to constitute the majority of Yukon visitors. They have proven to be the folks with the time and money, as well as interest and motivation, to travel to the Yukon. Yukon's visitors from North America and overseas markets are demographically very similar. However, their travel behaviours are quite different. The priority for each geographic market is discussed in this plan in the Situational Analysis.

Primary Target Audience

- Age: 35+
- Have made a trip of 2,000 miles in the past five years
- Employed or Retired
- Well Educated
- Single, Married or Divorced
- No Children

Secondary Target Audiences

- Age: 35+
- Have made a trip of 2,000 miles in the past five years
- Employed
- Well Educated
- Single, Married or Divorced

- Age: 35 and under
- Have made a trip of 2,000 miles in the past five years
- Well Educated
- Single, Married or Divorced
- No Children

Target Geographic Markets

Primary

- North America: Canada, U.S.
- German-speaking Europe
- UK

Secondary

- Asia: Japan, Taiwan
- Pacific: Australia, New Zealand

Tertiary

- Europe: Netherlands, France, Italy
- North America: Mexico

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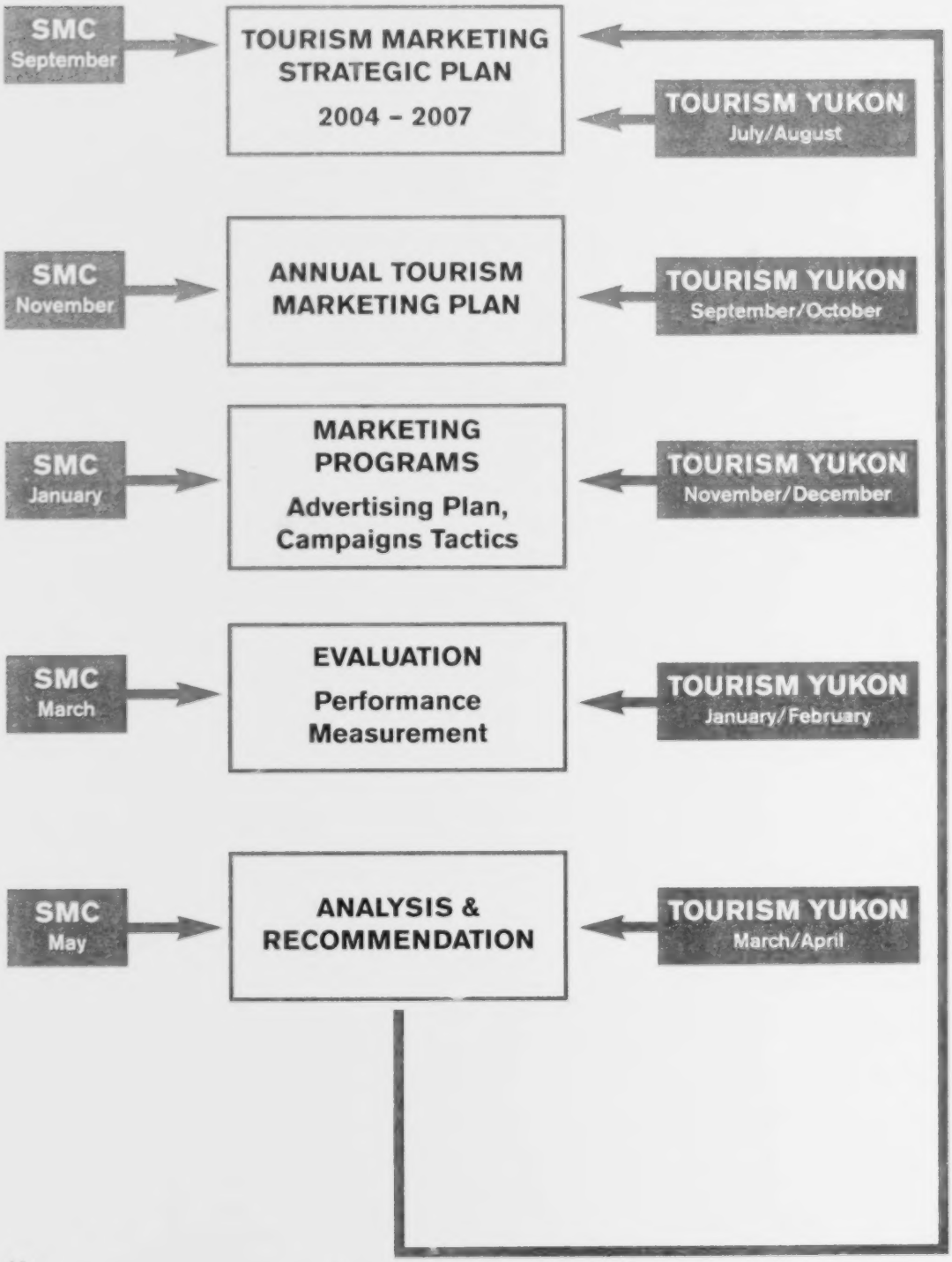
TOURISM MARKETING: Market Planning

Marketing Implementation Cycle



TOURISM MARKETING: Situational Analysis and Market Priorities

Overview of Yukon's Tourism Industry

Economic Value of Tourism

REVENUE	**$164 million**	**(2000)**
JOBS	**1,900**	**(2000)**
AFFECTED BUSINESSES	**890**	**(2000)**

What is Tourism Worth in the Yukon?

In 2000, it was estimated that $164 million in revenue was directly attributable to non-resident tourism. In 1998, the tourism-related revenue was estimated at $135 million.

This figure is based on revenue estimated by Yukon businesses, generated by non-resident spending. It does not include Yukon resident spending, or any indirect spending in the territory which is a spin-off of tourism, such as new hotel construction, cleaning services, consulting, etc.

Note: The 1998 and 2000 Yukon figures have been adjusted for inflation and reported in 2000 equivalent dollars.

How Many Yukon Jobs are Supported by Tourism?

Approximately 80 per cent of all Yukon employees work for businesses which reported at least some level of tourism revenue. This is up from 66 per cent in 1998.

- It is estimated that 1,900 jobs are directly dependent on tourism
- This represents approximately 11 per cent of all jobs in the Yukon (down 1 per cent from 2000)
- Tourism is the largest private sector employer

How Many Yukon Businesses Create Those Jobs?

Eight hundred and ninety Yukon businesses (41 per cent of Yukon businesses responding to the survey) report revenue generated from tourism. In 1998, 1,185 businesses (47 per cent of Yukon businesses) reported revenue generated from tourism.

- Fifteen per cent of Yukon businesses generate more than one-third of gross revenues from tourism
- The traditional tourism sectors such as accommodations, food & beverage, retail, and transportation are the largest generators of tourism-related jobs
- Over half of the non-traditional sector businesses such as wholesale trade, finance, insurance, and real estate derive a portion of their revenues from tourism

About the Business Survey

In 2003, the Yukon Bureau of Statistics surveyed Yukon businesses regarding their 2002 business year. More than 2,000 businesses completed the questionnaire. Estimates based on those findings form a snapshot of businesses contributing to the tourism industry for 2002. The Department of Tourism and Culture is working with the Bureau of Statistics to finalize results, which should be available by mid-2004.

"Tourism" is defined as non-Yukon, non-commercial, non-government revenue. It does not include any Yukon resident travel. The employment and revenue estimates are based on the perceptions business owners have of the percent of their revenue, which is generated by non-Yukon, non-commercial, non-government income.

TOURISM MARKETING: Situational Analysis and Market Priorities

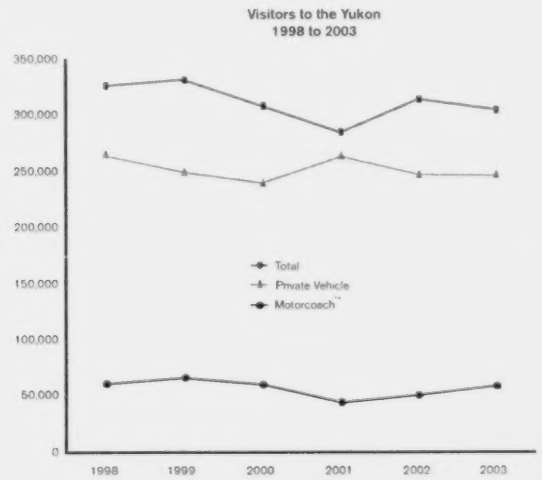
What Makes Up the Tourism Industry in the Yukon?

Tourism is spread throughout the Yukon economy. Businesses across nearly all sectors feel the impact of tourism, from large organizations and government, to small, one-person companies. The tourism industry is grouped into eight categories: Accommodations, Food & Beverage, Transportation, Adventure Tourism & Recreation, Events & Conferences, Travel Trade, Attractions and Tourism Services. In the Yukon, a large percentage of these businesses are small, sole proprietorships and are often seasonal operations. This diversity provides challenges to define tourism, quantify its size and measure its full economic impact.

How Many Visitors Create This Demand?

In 2003, an estimated total of 313,290 visitors came to the Yukon:

- 77 per cent arrived between June and September
- Total visitation decreased 3 per cent since 2002
- Private vehicle traffic has decreased 6.6 per cent since 2002
- Motorcoach traffic was up 16 per cent since 2002
- Dawson marine traffic (Yukon Queen, May to Sept) increased 10 per cent since 2002
- Passengers arriving at the Whitehorse International Airport were up 6 per cent since 2002



* The number of travellers that have visited the Yukon is a conservative estimate, as official border crossing statistics do not include air arrivals into Whitehorse from Vancouver/Calgary/Edmonton or those travelling up the Alaska Highway/Stewart Cassiar Highway and entering at Watson Lake. Although many of these travellers venture into Alaska and cross the border back into the Yukon (and thus would be captured in the border crossing statistics) many travel exclusively in the Yukon and are not included in the final border crossing figures.

Note: Total visitors to the Yukon include Yukon residents, they do not include those in commercial vehicles or train. Visitors arriving by air and marine arrivals (Dawson City) are reported separately above.

Border Crossing Statistics

The main sources of information included in this report are Yukon Border Crossing Statistics. *Yukon Border Crossing Statistics* are annual (January to December) and are generated by the Yukon Bureau of Statistics from daily border crossing sheets provided by Canada Customs. The figures include border crossings at the four official land border crossings into the Yukon: Fraser (Skagway), Pleasant Camp (Haines), Beaver Creek and Little Gold (Dawson).

TOURISM MARKETING: Situational Analysis and Market Priorities

Introduction

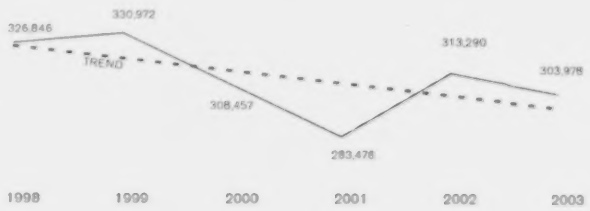
Utilizing border crossing statistics as an indicator, the top ten countries to visit the Yukon in 2003 were the United States, Canada, Germany, United Kingdom, Switzerland, Australia, Netherlands, France, Austria and New Zealand. Visitation from New Zealand, 482, surpassed that from Italy, 362, during 2003, although more visitors came from Italy during the previous five years.

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Totals

1998	1999	2000	2001	2002	2003*	Total
326,846	330,972	308,457	283,476	313,290	303,978	1,867,019

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics. * The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

Since 1998, over **1,867,000** travellers have visited the Yukon. This is a conservative estimate as official border crossing statistics do not include air arrivals into Whitehorse from Vancouver, Edmonton or Calgary or those travelling up the Alaska Highway/Stewart Cassiar Highway and entering at Watson Lake. Although many of these travellers venture into Alaska and cross the border back into the Yukon (and thus would be captured in the border crossing statistics) many travel exclusively in the Yukon and are not included in the final border crossing figures.



Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

The annual number of border crossings made by visitors into the Yukon fluctuates each year. The total number of visitors has declined since reaching a peak during the anniversary years of 1998 and 1999.

Annual Yukon Border Crossing Statistics – 1998 to 2003 – By Origin

	1998	1999	2000	2001	2002	2003*	Total
Canada	72,858	65,183	61,299	59,607	62,053	62,793	**383,793**
United States	225,024	236,459	218,390	200,608	229,000	217,530	**1,327,011**
Other	28,964	29,330	28,768	23,261	22,237	23,655	**156,215**

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

• The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

TOURISM MARKETING: Situational Analysis and Market Priorities

North American Market

The majority of visitors travelling to the Yukon are from the United States. In 2003, 72 per cent of Yukon visitors were from the United States. However, many of these visitors are passing through the Yukon on their way to Alaska and as a result spend considerably less time and money in the Yukon per party than other groups of visitors (see results from the 1999 Visitor Exit Survey).

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Mexico	157	309	242	364	395	421	**1,888**

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A key factor in the global situation is the performance of the U.S. economy. The U.S. economy seems to be recovering, with Gross Domestic Product growth of 3.8 per cent expected in 2004.

Highlights of the Canadian Tourism Research Institute's (CTRI) *Winter 2004 Business Outlook* include the following:

The appreciating value of the Canadian dollar appears to be hurting U.S. travel to Canada. The CTRI predicts that the first quarter of 2004 will see a 1.5 per cent decline in U.S. travel to Canada. The outlook for U.S. group leisure travel suggests a 4.0 per cent drop, the highest among all segments measured, while business travel is expected to decline 2.5 per cent.

Visitors to the Yukon from Canada usually travel exclusively in the Yukon and thus are under-represented in the border crossing statistics. The CTRI outlook states that Canadian travel suppliers and receptive agent bookings suggest continued growth with an overall 2.5 per cent rise in overall bookings for domestic travel for the first quarter of 2004. Consumer confidence will help drive Canadians to travel; leading the growth will be domestic leisure group bookings, increasing by 3.5 per cent.

For winter 2004, CTRI predicts a modest 1.5 per cent increase in travel to Canada from Mexico, despite a slowdown in economic growth in Mexico.

Yukon Border Crossing Statistics – 1998 to 2003 – Dawson – Yukon River

	1998	1999	2000	2001	2002	2003	Total
Dawson Marine			8,209	7,630	6,402	7,041	**29,282**

Note: Dawson marine numbers are recorded between May and September.

Annual Whitehorse Airport Passenger Traffic – 1998 to 2003

	1998	1999	2000	2001	2002	2003	Total
Arrivals	71,897	75,039	76,159	76,776	75,219	79,511	**454,601**
Departures	73,241	74,882	76,666	77,096	76,472	79,750	**458,107**

Source: Whitehorse Airport – Highways and Public Works (YTG).
Totals include all passengers arriving in Whitehorse on commercial flights.

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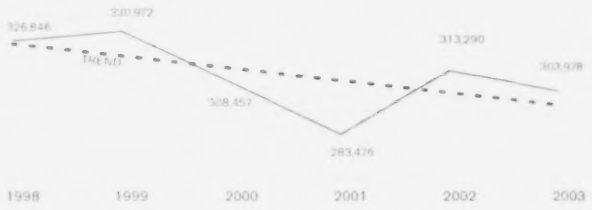

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The appreciating value of the Canadian dollar appears to be hurting U.S. travel to Canada. The CTRI predicts that the first quarter of 2004 will see a 1.5 per cent decline in U.S. travel to Canada. The outlook for U.S. group leisure travel suggests a 4.0 per cent drop, the highest among all segments measured, while business travel is expected to decline 2.5 per cent.

Visitors to the Yukon from Canada usually travel exclusively in the Yukon and thus are under-represented in the border crossing statistics. The CTRI outlook states that Canadian travel suppliers and receptive agent bookings suggest continued growth with an overall 2.5 per cent rise in overall bookings for domestic travel for the first quarter of 2004. Consumer confidence will help drive Canadians to travel; leading the growth will be domestic leisure group bookings, increasing by 3.5 per cent.

For winter 2004, CTRI predicts a modest 1.5 per cent increase in travel to Canada from Mexico, despite a slowdown in economic growth in Mexico.

Yukon Border Crossing Statistics – 1998 to 2003 – Dawson – Yukon River

	1998	1999	2000	2001	2002	2003	Total
Dawson Marine			8,209	7,630	6,402	7,041	**29,282**

Note: Dawson marine numbers are recorded between May and September.

Annual Whitehorse Airport Passenger Traffic – 1998 to 2003

	1998	1999	2000	2001	2002	2003	Total
Arrivals	71,897	75,039	76,159	76,776	75,219	79,511	**454,601**
Departures	73,241	74,882	76,666	77,096	76,472	79,750	**458,107**

Source: Whitehorse Airport – Highways and Public Works (YTG).

Totals include all passengers arriving in Whitehorse on commercial flights.

TOURISM MARKETING: Situational Analysis and Market Priorities

Strategy Priorities by Market

Tourism Yukon's marketing efforts are focused primarily on generating awareness and education of the tourism product through the travel trade. While there's recognition that roles are changing and there are challenges for our travel trade partners (i.e. due to direct sales, etc.), the distribution network from tourism suppliers to the travel trade continues to provide reach and means to generate market share.

Strategic Priorities – North America

- Attract U.S. travel trade partners to carry high-yield niche products
- Work with U.S. travel trade partners to maintain and foster new products in motorcoach, van tours and non-motorcoach markets
- Work with the CTC and other industry partners where we do not have representation to develop key and emerging markets
- Develop trade fam tour and event in relation to high-yield niche products
- Attend trade shows to expose Yukon product and information

North American: Motorcoach Market

Since 1998, over **333,000** visitors entered the Yukon via motorcoach. The majority of motorcoach visitors are from the United States and are touring through the Yukon as part of an add-on land portion of an Alaskan cruise. The cruise-related motorcoach visitors usually travel one way through the Yukon either from Skagway to Anchorage, or Anchorage to Skagway. Most motorcoach cruise packages travel through either Haines Junction/Kluane or Dawson City.

Annual Yukon Border Crossing Statistics – 1998 to 2002 – Motorcoach

	1998	1999	2000	2001	2002	2003*	Total
Motorcoach	58,710	65,528	59,266	43,838	49,546	56,821	**333,709**

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

* The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

The annual number of border crossings made by motorcoach visitors into the Yukon fluctuates each year. The total number of visitors has declined since reaching a peak during the anniversary years of 1998 and 1999. Motorcoach traffic through Yukon increased in 2003.

The bulk of group travel in the Yukon is motorcoach followed by van and specialty tours. Most coach tours include Alaska. Discussion with industry indicates the bulk of the motorcoach visitation is made up of Gray Line/Holland America. There are 20 to 30 other tour operators who offer coach departures to or through the Yukon yearly or when demand warrants.

Strategic Priorities – North American: Motorcoach Market

(Strategic priorities to be developed with SMC)

TOURISM MARKETING: Situational Analysis and Market Priorities

North American: Non-Motorcoach Market

(Personal vehicles i.e. cars, trucks, campers, RVs etc)

Since 1998, almost **1,500,000** non-motorcoach visitors travelled to the Yukon. It is important to distinguish the non-motorcoach segment of travellers from the motorcoach segment, as they have vastly different travel and spending patterns. Motorcoach visitors spend fewer days in the Yukon and spend less per person during their trip. Motorcoach visitors also have much less flexibility as they travel throughout the Yukon, when compared to non-motorcoach travellers.

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Non-Motorcoach

	1998	1999	2000	2001	2002	2003*	Total
Non-coach	268,136	265,444	249,191	239,638	263,744	247,003	**1,533,156**

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

* The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

The annual number of border crossings made by non-motorcoach visitors into the Yukon fluctuates each year. The total number of visitors has declined since reaching a peak during the anniversary years of 1998 and 1999.

Strategic Priorities – North American: Non-Motorcoach Market

(Strategic priorities to be developed with SMC)

European Market

Since 1998, over **123,000** European travellers have visited the Yukon. This is a conservative estimate as official border crossing statistics do not include air arrivals into Whitehorse from Vancouver, Edmonton or Calgary, or those travelling up the Alaska Highway or the Stewart Cassiar Highway and entering at Watson Lake. Although many of these travellers venture into Alaska and cross the border back into the Yukon (and thus would be captured in the border crossing statistics) many travel exclusively in the Yukon and are not included in the final border crossing figures. The decrease in border crossings from 2001 to 2002 may be as a result of an increase in visitors arriving in Whitehorse on Condor and travelling one-way from Whitehorse to Anchorage.

The European markets decreased significantly since 2000 with a slight resurgence of visitors in 2003. The top seven European countries of origin all saw an increase in visitors with the exclusion of Italy. Statistics reported for summer 2003 (May to September) indicate that the number of European visitors grew 6 per cent from summer 2002. This is important as overseas markets generally spend more time in the Yukon and spend considerably more money per party than visitors from the United States.

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Europe

	1998	1999	2000	2001	2002	2003*	Total
Germany	12,529	11,298	10,491	8,346	7,457	7,775	**57,896**
U.K.	3,142	3,841	3,971	3,564	3,720	3,978	**22,216**
Switzerland	2,621	2,707	3,331	2,980	2,213	2,599	**16,451**
Netherlands	338	917	1,235	1,151	1,355	1,237	**6,233**
France	1,114	956	824	634	592	709	**4,829**
Austria	799	605	962	529	473	544	**3,912**
Italy	624	677	541	457	458	362	**3,119**
Other	2,095	1,499	1,477	1,234	1,188	1,372	**8,865**
Total	23,262	22,500	22,832	18,895	17,456	18,576	**123,521**

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

* The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

In 1998, direct charters from Europe to Whitehorse were established and have increased in frequency and popularity. In the first five years of operation **18,182** European travellers landed in Whitehorse directly from Frankfurt or Zurich (Condor, Balair, Air Transat). The top seven European countries account for over 98 per cent of passengers on these flights (see table below). With increased air access and focused product development in the Yukon this market can only continue to expand.

Strategic Priorities – Europe

- Work with charter and scheduled air carriers on access to the Yukon and domestic and international connectivity via cities
- Continue to promote air access awareness to the travel trade including tour operators, wholesalers and agents
- Winter will be one of the strategic priorities for travel trade particularly for maturing German-speaking Europe
- Reaching the consumer through supporting the trade in their cooperative marketing efforts including winter promotions particularly in German-speaking Europe
- Educating the travel agent and tour operator reservation staff training will also be an important part of the marketing mix in the future, particularly for the maturing European markets
- Develop a winter fam tour for the German travel trade
- Develop meeting and incentive market in Europe in conjunction with Yukon Convention Bureau
- Work with the Yukon Wild marketing group in identifying market opportunities in overseas markets

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Europe Air

	1998	1999	2000	2001	2002	2003	Total
Carriers	1	3	3	2	1	1	-
Flights	16	22	48	52	37	37	210
U.K.	0	5	10	13	3	5	36
France	16	3	22	17	34	40	132
Italy	2	15	21	26	34	33	131
Netherlands	29	15	27	16	17	18	122
Austria	66	69	166	250	241	250	1,042
Switzerland	94	84	667	901	508	605	2,859
Germany	3,095	2,292	3,235	3,114	2,756	3,249	18,074
Other	53	29	54	75	108	119	438
Total Passengers	3,355	2,512	4,202	4,412	3,701	4,319	22,501

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

Note: These figures are not explicitly included in the border crossing statistics listed above – although if during their travels passengers crossed into Alaska and back to the Yukon they would be included.

Highlights of the Canadian Tourism Research Institute's (CTRI) *Winter 2004 Business Outlook* include the following:

Trends suggest that the U.K. market is ready to travel again. The outlook forecasts that next winter U.K. overnight travel will increase 3.2 per cent compared to last year. The outlook for group leisure travel shows an increase of 4.0 per cent while the FIT leisure travel segment is expected to grow by 3.0 per cent. The forecast for France is an overall 3.0 per cent increase compared to last year, where both FIT and group leisure travel are expected to experience 3.8 per cent and 2.8 per cent growth respectively. Germany is also expected to see 3.5 per cent growth in overall travel, with group leisure travel expected to increase 4.5 per cent while FIT travel should expand by 3.5 per cent.

TOURISM MARKETING: Situational Analysis and Market Priorities

Asian Market

The Asia/Pacific region constitutes several countries, however in this analysis we are offering data only from selected markets which we view as our primary markets. During 2003, Yukon experienced an overall decrease in the number of visitors from Asia.

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Asia

	1998	1999	2000	2001	2002	2003*	Total
Japan	487	354	288	435	419	376	2,359
Taiwan	-	-	-	40	113	102	255

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

* The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

In 2004, Asian economies are expected to be led by China, which is expected to post 7.0 per cent growth.

Highlights of the Canadian Tourism Research Institute's (CTRI) *Winter 2004 Business Outlook* include the following:

The outlook for Japanese travel in the first quarter of 2004 indicates an overall 3.3 per cent rise. Leisure group bookings will lead growth at 4.5 per cent while FIT leisure travel should rise by 3.0 per cent.

An economic recovery is underway in the rest of Asia, initiated by a post-SARS rebound. All CTC's target markets from non-Japan Asia are expecting to post positive growth, lead by China (7.0 per cent), South Korea (4.0 per cent), Hong Kong (3.0 per cent) and Taiwan (2.8 per cent).

Despite a strengthening currency and airline capacity issues on the trans-Pacific route to the West Coast of Canada, advance bookings to Canada point to an increase in the first quarter of 2004 of 3.3 per cent.

Strategic Priorities – Asia

- Develop the aurora viewing market from Japan and Taiwan and combine this product with fall colour viewing
- Target Vancouver-based inbound operators to attract visitors
- Foster summer touring and the adventure market from Japan (i.e. hiking, canoeing, kayaking)
- Provide support to Yukon College for ESL educational tour program

TOURISM MARKETING: Situational Analysis and Market Priorities

Pacific Market

Annual Yukon Border Crossing Statistics – 1998 to 2003 – Pacific

	1998	1999	2000	2001	2002	2003*	Total
Australia	3,018	3,243	2,874	1,897	2,128	2,253	15,413
New Zealand	569	514	484	382	423	482	2,854

Source: Annual Yukon Border Crossing Statistics – Canada Customs and Yukon Bureau of Statistics

* The December values for 2003 have been forecasted by the Department of Tourism & Culture based on previous visitor statistics.

The recently-released report on Australia, *Australian Consumer Research 2002* (Volumes 1, 2 and 3) includes the following highlights:

- Of the Asian/Pacific markets, Australia is one of the youngest, most active and wealthy, with 28 per cent of the market aged between 25 and 34
- Australians make long trips to Canada – the average trip length with Canada on the itinerary is 42.2 nights, of which 22.6 nights are spent in Canada.

Strategic Priorities – Australia

- Generate travel trade awareness of Yukon's year-round tourism products with particular attention to educating the retail travel agent
- Support cooperative marketing efforts of travel trade partners
- Develop trade fam tour
- Attend trade and media events to expose Yukon product and information

TOURISM MARKETING: Strategic Priorities

Yukon Branding Program

Tourism Yukon is in the process of developing a Yukon Branding Program. By developing a concise Brand Plan for the Yukon, we will differentiate the Yukon from other travel destinations and stimulate consumer interest to plan a trip to the Yukon.

- Develop a Brand Positioning Statement, Brand Promise, Brand Stewardship Guidelines, Stakeholder Reputation Management Guidelines and Guardianship Guidelines
- Icon identification
- Leverage the power of the Yukon brand into new markets and countries
- Protect and develop Yukon brand equity
- Consult and coordinate Yukon brand identification with all Yukon stakeholders

Air Access

- Enhance efforts to promote affordable international and domestic air access to the Yukon
- Continue to work with our industry partners to enhance visitation from our gateway cities
- Continue to strengthen our relationships with air carrier partners including Condor, ZIP, Air Canada and Air North
- Continue to work with our charter and scheduled air carrier partners to enhance access and connectivity to the Yukon which would include exploring potential international connections via Alberta and British Columbia
- Continue to promote air access awareness to the travel trade including tour operators, wholesalers and agents

Decade of Sport and Culture

In November 2003, the Yukon government announced a new initiative, the Decade of Sport and Culture, to maximize the benefits that the 2007 Canada Winter Games and the 2010 Winter Olympics can provide to all Yukon communities. By engaging Yukon businesses, community groups and individuals, the Department of Tourism and Culture will creatively plan ways to bring attention to the array of events, celebrations and activities that will attract participation from other Canadians and international visitors.

- An additional $200,000 is committed in the current Tourism and Culture budget
- $150,000 is allocated to develop a "Best Ever" program to increase the capacity, professionalism and delivery of sport and cultural programs in all Yukon communities

Product Development

Developing new tourism products and improving access to parks and other wilderness areas in the Yukon remains a strategic priority. The Yukon will work to increase the number, variety, quality and type of products needed to grow tourism revenues.

- Improve Yukon's tourism products to exceed standards
- Grow year-round destination tourism in each region
- Grow products to meet emerging and existing niche market demand
- Develop and/or identify winter products, experiences and events for international markets

Yukon Scenic Drives

A proposed Yukon Scenic Drives program will incorporate tourism marketing and product development initiatives to promote distinct driving experiences to and through the Yukon, cultural corridors and transportation routes. Initially the initiative will focus on the Alaska and Dempster Highways. Other highways, scenic drives and cultural corridors could be featured in subsequent years if this were a multi-year initiative.

TOURISM MARKETING: Strategic Priorities

Research

Up-to-date relevant tourism research and market intelligence will delivered to industry in a cost-effective manner. It will analyze key target markets on the basis of return on investment, considering direct tourism revenues, market share, potential for growth, air service and available marketing resources.

Priorities include:

- Developing a Research Strategy and performance measurement framework
- 2004 Yukon Visitor Exit Survey
- Annual Conversion Study – consider two intakes
- Research to support program design (focus groups)

Industry requested that a Winter Visitor Exit Survey be considered to establish benchmarks, as winter tourism in Yukon continues to expand, driven by internationally-recognized events and non-traditional partnerships.

Customer Relationship Marketing

Customer Relationship Marketing will play an increasingly important role in Tourism Yukon's marketing strategy, investments and execution. This will require mounting coordinated, professional and timely marketing programs in partnership with our tourism industry and other partners.

- Assemble and maintain a high-quality database of high potential Yukon visitors
- Distribute detailed information tailored to the consumer requests and stated interests
- Marketing messages and initiatives must speak to the lifestyle expectations of potential visitors

Mass Communications

As technology advances, media options and flexibility have significantly increased. Consumers are presented with a wide array of media to obtain travel information. Our advertising campaigns need to optimize the different technologies to strategically target our potential visitors as they are advancing through the destination decision making process.

- We may need to fundamentally change how we approach visitor recruitment
- Review collateral materials and make decisions in consultation with industry to refocus, rebuild or start over
- Develop an annual advertising plan to encourage private sector investment and enhance the impact of Tourism Yukon's advertising programs (electronic, print and direct mail)
- Electronic advertising options are expanding and Tourism Yukon will continue to promote Yukon tourism product through www.touryukon.com
- Work with other organizations and partners to drive more traffic to Web-based promotions and fulfillment
- Print campaigns promoting image awareness will continue to be tied to direct response programs to stimulate potential visitor awareness and encourage visitation
- Use direct mail campaigns to qualified lists to effectively deliver qualified inquires
- Cooperative advertising opportunities will be incorporated into most programs and communicate to industry through advertising plans and programs

TOURISM MARKETING: Strategic Priorities

Tourism Cooperative Marketing Fund

The Tourism Cooperative Marketing Fund (TCMF) will assist market-ready individual tourism-orientated business, municipalities, organizations or consortiums of tourism businesses to partner with the Department of Tourism & Culture to develop and deliver marketing initiatives that promote tourism services and products while creating awareness of Yukon in markets outside of the territory.

Niche Marketing Programs

In a land of vast wilderness and historical significance, the Yukon is an ideal destination for outdoor adventures, learning and cultural travel. With an increasing number of travellers looking for educational and experiential vacations, the Yukon is well positioned to offer these products.

- Work with the Yukon First Nation Tourism Association to develop niche cultural Aboriginal products
- Continue to support Yukon festivals and events throughout communities
- Learning and cultural travel
- Explore options with the CTC to promote niche markets
- Support the Wilderness Tourism Association's niche advertising initiatives

Media and Public Relations

Media Relations is recognized as the most cost-effective initiative to generate consumer awareness of the Yukon. The main activities involved in media relations are networking, building relationships with journalists, media promotions and working with the CTC and industry stakeholders to arrange media visits.

- Expand recognition of the Yukon as a premier year-round travel destination by attaining maximum unpaid media coverage throughout the world
- Develop program partnership opportunities that leverage financial resources to assist industry in obtaining the critical mass necessary to effectively reach and impact target markets

Partnerships

Yukon is a strong brand that is enhanced when it is twinned with the parent brand – Canada. Tourism Yukon will continue to work in coordination with the North American and international activities of the Canadian Tourism Commission.

- Continue to lobby for the restructuring of marketing partnership funding criteria
- Work with the CTC to enhance effectiveness of North American programs for the Yukon

Travel Trade

There is recognition that traditional roles are changing and there are challenges to the travel trade (i.e. with direct sales through the Internet, etc.). Maintaining market share has become more of a challenge for tour operators and agents worldwide. Tourism Yukon continues to support the travel trade through a travel trade Web site, attendance at trade shows, distribution of collateral materials, partnerships and the Yukon and Canada Specialist Travel Agent Programs.

- Key role of travel trade is to strengthen the connection between buyer and seller
- Winter will be one of the strategic priorities for travel trade particularly for maturing German-speaking Europe
- Reaching the consumer will also become an important part of the marketing mix in the future, particularly for the maturing European markets
- While Yukon enjoys substantial visitor numbers from North America, opportunities to attract more high-yield niche markets will be explored
- Continue to work with CTC and other industry partners to develop primary, secondary and emerging markets

TOURISM MARKETING: Strategic Priorities

Information Services

Information Services is responsible for the management and operation of the Yukon Visitor Reception Centres (VRCs), travel counselling services, 1-800 call centre and the fulfillment of information requests.

The VRCs will be a network of Yukon "Information Specialists" where visitors can find everything they want to know, as well as providing more value-added experiences for the visitor by incorporating other activities such as lectures or live performances.

- Ensure fulfillment of advertising inquiries are done in a timely and cost-effective manner with an initiative that will increase visitor contacts
- Replace the Canada's True North on Wheels program

National Tourism Strategy

The National Tourism Strategy is being developed through a collaborative and coordinated approach between the public and private sectors. The strategy will explore opportunities to develop new research approaches that will stimulate action and innovation in product development and marketing.

- Yukon is participating in the development of the new National Tourism Strategy, which will blueprint a strategy to position Canada as a top 10 destination in the world
- The new strategy requires coordinated efforts that recognize the specific needs of provinces, territories and Aboriginal peoples

TOURISM MARKETING: Performance Measures

Performance Measurement Framework

It is critical that the Marketing Branch embraces and entrenches a consistent performance measurement process to evaluate the success of its marketing programs. This framework would be applied to all programs, where practical (i.e. the cost to measure does not exceed delivery costs).

The method will vary with the program design. In some cases, there will be a direct relationship between an advertisement and a potential Yukon visitor, which can be measured by the number of inquiries the advertisement generated. In other instances, the relationship may be indirect between the department's general sales agents overseas and a Yukon visitor, which will need to be evaluated in another manner such as operator/travel trade generated statistics or interviews.

Programs must have clearly defined, practical objectives, which can be measured. The program must reflect these objectives and detail the appropriate research method for evaluation, the associated funds committed for the research, the responsibilities of parties involved and their commitment to meet these obligations.

Results will be evaluated to determine if the program, or its elements, will be repeated, modified, or discontinued.

Budget Implications

There is no simple rule of thumb for estimating the cost to measure program performance. Each program may require a different approach and costs will vary. It is estimated that 10 to 20 per cent of total program costs should be allocated to conduct meaningful performance measurement.

The Marketing Branch will develop a performance measurement framework that will be endorsed by industry.

Performance Measures

Performance measures will include but are not limited to:

Tourism Spending

Tourism spending will be the primary macro-measure and overall economic measure.

Number of Inquiries

The number of calls to the 800 number, the number of people registering online to receive a vacation guide, those registering at consumer shows, business reply card (BRC), purchased lists, email inquiries, unsolicited inquiries and referrals.

Cost per Inquiry

The cost to generate an inquiry. Specifically, ad placement cost + ad development costs + fulfillment costs divided by the number of inquiries.

Conversion Rate

The number of visiting parties who actually visit the Yukon expressed as a percentage of the number of inquiries that we sent information to.

Return on Investment (ROI) Ratio

The ROI expressed as the ratio of tourism revenue generated against each dollar invested to convert a visitor.

TOURISM MARKETING: Performance Measures

Partner Leveraging Measures

Calculate the investment by industry partners in the cooperative marketing programs delivered by Tourism Yukon. Ad investments made by partners in the partnership programs will be expressed in dollars and as a percentage of Tourism Yukon's investment in each program.

Marketing Projects Measures

Report on the status and/or successful implementation of all projects and initiatives stated in the short-term goals.

Stakeholder Satisfaction Measures

Through a survey, determine the extent to which our stakeholders are satisfied with the services and activities of Tourism Yukon and their contractors.

Visitor Satisfaction/Loyalty Measures

Determined by experience and value questions that are included in the Visitor Exit Survey.

Awareness Measures (Media, PR and Partnership Program)

Calculation of the value of appropriate and relevant media articles and coverage generated through the Media/PR program. The number of inquiries generated will measure partnership program awareness and investments in the Yukon-branded components of promotions.

TOURISM MARKETING: Performance Measures

Evaluation and Analysis

Global tourism is a dynamic, highly-competitive industry, which is readily influenced by social, political, economic and environmental factors. Competing destinations need access to and interpretation of current, relevant market intelligence to maintain or increase their share of target markets.

Information is required in two strategic areas: details on the potential market; and details related to actual visiting markets. Information regarding potential markets is available from a myriad of sources, and is generally conducted by national or international agencies i.e. CTC, Canadian Tourism Research Institute etc. Information on actual markets is generated by primary research (Visitor Exit Surveys, Conversion Studies) conducted by Tourism & Culture, travel trade intelligence and a number of secondary sources i.e. Statistics Canada, CTC etc.

Evaluation and analysis of this data will provide information to aid government and industry partners to make tactical decisions regarding marketing and product development programs.

- Tourism Yukon will report on each program delivered through the Tourism Marketing Strategy and Tourism Marketing Implementation Plans
- A series of benchmarks will be established where appropriate to enable the Department, the YTMP Senior Marketing Committee and Industry partners to evaluate the success of each marketing program
- Evaluation and analysis reports and observations will be delivered and reviewed prior to developing the annual updates of the Tourism Marketing Strategy and new annual Tourism Marketing Implementation Plan

Yukon
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